

Using Multiple Matters (per client):

Settings/Client Settings Screen:

Interbill comes with multiple matters turned off. To turn on multiple matters, go to Settings/Client Settings, check the first box on the left, "Enable Multiple Matters Per Client" and SAVE.

Clients Screen:

After you enable multiple matters, go to the Clients screen, Matters section (screen mid right) and you will see an "Add" and "Delete" button. To add additional matters click add, Matter 002 will appear, fill it out. Also next to the word **Matter** in the section header will be a new text box that displays what matter you have selected. Use the down arrow in this box to select other matters. You only need to do this when adding or changing Matter information.

Log Screen:

On the Log you will now have a down arrow in the Matter input text box that allows you to select the matter to which you want to record charges.

Payments, Trusts and Retainers are recorded for the client only, not the matter.

End 2/27/17